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ABSTRACT

One type of qualitative (descriptive) research that holds promise for studying gifted education is the ethnographic approach, which focuses on the students' and teachers' points of view and considers their social and cultural interaction. The process of ethnographic research demands several components, such as: theory (shared sets of explanations regarding what is occurring and what it means to others present), use of multiple tools in fieldwork (such as observation, interviews, written sources, and unwritten records), an extended time span, the use of the researcher as the research instrument, and a research cycle. The final product of the ethnographic approach is a description of what is going on and how it makes sense to those involved. The report may be macro or micro oriented and may focus on one or more of six aspects: (1) the whole, (2) the meaning from the participant's viewpoint, (3) behavior, (4) the topic, (5) hypotheses generation, or (6) theory. Sample research topics for ethnographic research with the gifted include the social roles gifted children play during their education and social interactional consequences of varying innovations in gifted education. Ten references are listed. (CL)

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QUALITATIVE ASSESSMENT OF GIFTED EDUCATION

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To rise from a zero
And be a great hero
To answer these questions you'll strive--

"Where am I going
How shall I get there, and
How will I know I've arrived?"

(Adapted from Mager, in Savage, 1977)

This portion of a longer verse was written by Mager in praise of the sort of "behavioral objective" with which most people in education are familar. For illustration, "Given paper and pencil, a gifted student will be able to write a 200 word composition in 5 minutes with 98% spelling accuracy." Qualitative assessment does not necessarily use the sort of specific data that Mager advocates. Nevertheless, it can be a highly productive way of answering questions about where the participants in gifted education think they are going, how they think they will get there, and how they think that they know they have arrived.

Characteristics of Qualitative Research

Five characteristics of qualitative research listed by Bogdan and Biklen (1982) are as follows:

1. Qualitative research has the natural setting as the direct

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source of data and the researcher is the key instrument. Often the term naturalistic is used because the researcher observes and gathers data where the behavior under study is likely to occur; it happens naturally. To find out how gifted children use their time in a regular classroom, one may sit in a class or classes in which some children identified as gifted are working.

2. Qualitative research is descriptive. The data tends to give us a "feel" for what people said, did, or indicated what they were thinking about. It might include a written description of how some gifted children played with their peers during recess, or a videotape of how a gifted child constructed something artistic. (Numerical data may also be used)
3. Qualitative researchers are concerned with process as well as product. For example, formative evaluators can check to see what children were chosen to join a gifted program, if the selection methods were actually followed, if the results were appropriate or inappropriate, and what the perceptions of the students were during the selection process.
4. Qualitative researchers tend to analyze their data inductively. What the researcher sees comes first and out of that data are teased descriptive patterns, hypotheses, or even a theory. Going into the setting with ideas (hypotheses) has a role, but one that is flexible, amenable to change, as observations progress. As an imaginary example, one might go to a site with the idea

that many gifted children waste their time in a regular classroom. On observation one might notice a child who finishes her work in a fraction of the typical time and then spends considerable time sitting at her desk "doing nothing." After repeated observations one begins to feel time is being wasted. An interview is set up with that child; she explains that today she was working out in her mind how she could build a projectile which would travel further than the last one she made. This discovery might lead to more investigation of how gifted children really use their "spare" time.

5. "Meaning" is of essential concern to the qualitative approach. The perspective of the participants, (the way they see their situation, environment, behavior) is of importance to the naturalistic researcher. How do different people make sense out of their lives? How do gifted children perceive their roles: with each other, with their classmates, with their teachers, in their school?

Since case studies (bounded systems--a child, a class) and other such forms of qualitative research have long been on the scene, this article concentrates on an ethnographic perspective. Educational ethnographies are relatively new, especially in study of the gifted.

Ethnographic Perspective

It will come as no surprise that by "ethnographic perspective" I mean the studying and capturing of real-life processes of gifted education, ways of living in that social group context, its culture. Culture refers to people's on-going ways of perceiving, believing, evaluating,

and acting (c. f., Goodenough, 1971). Within this perspective questions to ask are: "What's going on here? What are the behaviors and their meanings? What's stable; what's changing; what's predictable?" A question with a more limited focus might be, "Why are materials in this gifted program placed and used as they are?" Knowing the answers to such questions could make a difference in a program.

We can further ask: "What are the rules the children and teachers in this gifted classroom have to know, produce, predict, and evaluate in order to participate?" (Heath, 1982). Or, "How do the members of this gifted group hold each other accountable?" Such study will produce a description, one among many possible descriptions.

The ethnographic perspective (adapted to the educational setting) first of all entails getting into the participant's perspective (e.g., the students' and the teachers' points of view). We get a picture of the people involved in their environment, such as, classroom, school, home, community. We get a cultural history of group relations concerning gifted education. We see what social and cultural knowledge these participants bring to and generate in the setting. We can compare them trans-culturally with others, in other settings. Such constructs are what I mean by ethnographic persnective.

Process Demands

Ethnographic perspective demands both a process and a product. As in all research, a first-rate product requires a rigorous process. Some of these components are:

• Theory. The method used with an ethnographic perspective is principled, even theoretically driven. But the use of the theory is highly flexible. The method creates the developmental growth of its own theories, grounding itself in past ethnographically-oriented work. Going into the setting open-minded is not going in empty-headed. We do have a body of explanatory ideas to relate to an ethnographic perspective for study of gifted children in their contexts.

For example, in the Lutz & Lutz study (1981) they make reference to Terman's generalization that gifted children are typically bigger than their less gifted peers. In the Lutz study gifted children were not bigger. Some were even bullied by bigger ones who felt "bullied" by the superior intellect of the gifted students. As a further example, my problem with my own research setting in Sweden was a lack of anthropological theories on Swedish world view. When I came to appreciate the explanatory idea of "permission consciousness" so strong in Swedish culture, much of the teacher and child behavior early on during creative problem-solving discussion was explained. We need shared sets of explanations regarding what is occuring and what it means to others present--theory. (Lundsteen, 1983).

• Use of multiple tools in fieldwork. Besides using and developing theory, an ethnographic process demands use of multiple tools, not just one tool. In becoming functional human beings, we have all relied on numerous sources, taking ample time to attend to many, many (if not all) significant avenues. In qualitative research the use of several sources

of data to discover and corroborate findings is referred to as triangulation. It is in contrast to the use of just a few sources, easy to understand, easy to count. Some of the multiple tools used in ethnographic fieldwork are observation, interviews, written sources, and unwritten records.

Observation. A favored tool for the ethnographic perspective is some degree of participant observation with some form of permanent record (e.g., field notes, audio tape, camera shots, video tapes). Observation emphasizes examining the context in which behavior occurs and usually aims to disturb the natural setting as little as possible. Nevertheless, there are degrees of participant observation ranging from limited (where the observer is very much an outsider) to highly involved (where the researcher interacts a great deal with the people under observation). A highly involved participant might be a teacher, observing the very class he or she is teaching. Other participant observers might be students or researchers who participate in activities with the class. Probably most people have been participant observers in their lives. They have "watched" and "asked" in a complex manner, not just using manageable, codable, punchable forms. The resulting insights may have resulted in much evaluation and growth, but most people have not been consciously using an ethnographic perspective.

Field notes. As a result of observation, the researcher makes some field notes. Field notes may vary widely in content. Five types of field notes may contain such diverse sections as:

1. frame setting information--setting, arrangement of physical space, participant's behavior, verbatim language, gestures, time sequence, and the nature and duration of interaction episodes
2. methodology--records of methods used and plans of what the researcher may do next
3. personal reactions--ethnographer's personal feelings, human reactions, even frustrations (valuable for keeping these less scientific sources of bias separate)
4. inferences--about gifted students, events, purposes, emotional tone, and processes
5. theory--pertaining to frameworks, models, patterns and constructs

Each type of field note may be tied to an event, or a series of events, or "scenic units" (to borrow a term from TV script writing). Categories emerge from the record; categories are not predetermined. Then the researcher can look at specific meanings and contrasts across the scenic units in which individuals confront themselves or others.

Thus, a prime tool is observation and its field notes. But what does the ethnographer observe and when? The answer is "Well, it depends." (Wolcott, 1980). Obervation is part of an inquiry process, with early observations serving to inform later ones and later ones influencing interpretation of earlier ones.

In the case of my own research, for example, it was not until we began to notice some style differences in behaviors from the video tapes

of Swedish children engaged in creative problem-solving discussions that we decided to start asking ourselves questions about "style." We began by observing the children and administering tasks to help us gain an insight into the types of styles they were using. But as we got to know the American kindergarten teacher well, we could see the advisibility and feasibility of adding other tools to the research. For example, since we valued the teacher's perspective, we developed a "Who in the Class?" questionnaire which we administered to the teacher. Her responses helped us to further identify (and corroborate our impressions of) children with different styles.

Interviews. Interviews, of course, involve the posing of questions to individuals. Once a question is asked, researchers have taken an irreversible step. They have left the tool of observation, where the scene parades before them, and moved into another set of tools, where specific information is sought. Interviews may range from informal conversations to formal interviews with prescribed sets of questions in sequence. They may involve questionnaires, formal surveys, tasks, or projective techniques (which an ethnographer may not use in a standard way). A key informant may be interviewed in depth or several peripheral figures may be asked a few casual, but pertinent, questions. Information may be sought about an event or a life's history.

There is a delicate balance between the roles of participant and observer. Not asking questions may result in missing out on important information; on the other hand, being too intrusive may result in the researcher directing the course of events too much. This intrusion may mean that the researcher is not observing an "intact scene" with a naturally

developing course of events, but a set of circumstances she/he has unwittingly helped to create. A safeguard for this type of potential problem is to observe first, getting to know the setting and its people rather well. As ideas begin to occur from the observations, tools of the genre labeled "interview" may be developed or modified in the field.

Written Sources. Another set of tools may be classified as "written sources." These might include: archival documents and records, less formal written documents such as journals, papers, and stories written by gifted students, or written evidence of library books being checked in and out.

Unwritten records. Unwritten records may include: maps, environmental-change diagrams, sociometry diagrams, photographs, films, video and audio tapes, and children's art work. For example, we collected three-dimensional collages made from paper circles that our kindergarten children in one study had created. Both their observed behavior in fashioning them and the features of their final product appeared highly informative to us. We "read" information about creative styles and less creative styles into what we collected. These data were confirmed by yet other tasks and observations. When we made maps of the room and school, we could plot how the participants moved through this space, or didn't move, indicating more "style" information.

A sample case of research using multiple tools ("triangulation"). In a recent study (Speck, 1984) the researcher attempted to examine how committed young gifted child were to some creative projects they were working on. She observed the children and included the use of video and audio tapes. She also interviewed the participants (teachers and students) who were involved in these projects. She devised some questionnaires to gain further information. She examined the products of their creative work. Examples were: a videotape adaptation of Shakespeare's Midsummer's Night's Dream, plays,

• Extended time span. Besides theory and multiple tools for field work, another demand of the ethnographic perspective is an extended time span. This kind of research needs large blocks of time in a setting, permitting observation of a full cycle of events (rather than on a short-term basis). Observation is prolonged and repetitive, e.g., a school year. Furthermore, the researcher needs to allow as much time for analysis and interpretation as for observation. One rule of thumb is: for each day of observation, a day of writing and digestion.

• The researcher as the research instrument. Another demand is that the well-trained ethnographer serves as research instrument. And what better tool is there for studying human behavior, in spite of human flaws, than another human being? We might draw an analogy to a human zoom lens, operating alternatively between figure and ground, ground and figure (or part-whole or whole-part). Needed training for these researchers may include not only background knowledge on the topic, e.g. our concern, (gifted education), but also how to get information, how to "get along," and the ethics of the interaction (Seiber, 1982). Training may include tasks of noting key incidents; frequently these are recurrent events. In addition key incidents may be examined in relation to other key incidents, to wider social contexts, and to a theoretical base.

• Ethnographic research cycle. By now it will be evident that the inquiry process demands a research cycle, feeding back on itself. The cycle may include such steps as the following:

1. Select a project while holding an open mind. (An example might be: qualitative assessment of a gifted program for grade three.)
2. Gain access and building rapport. (Start building a relationship of mutual confidence and respect with the administrators, teachers, and students.)
3. Ask questions from an ethnographic perspective. (What's going on here?") Reformulate questions, sometimes making them more specific, as you get into the study and learn more. (For example, "Is the gifted program helping this particular child? Why or why not?" or "What times of day seem to be most productive for this pull-out program?")
4. Collect data in the field, and collect more data as you are informed and revise your questions. (For example, at first watch the whole group at work, as often as possible during the day. Then start observing how one child uses her time. Ask her what she is doing and how she feels about it. Observe the whole group at different specific times to see how the time is used.)
5. Analyze your data and go back for more. (For example, the group came up with more ideas on how to solve a problem on Tuesday than on Wednesday. Why? Sally had a lot to say this week but was almost totally silent during the following week. Was it the change of project, or what?)

Needless to say, these steps are cyclical, not linear. There is an interaction between and among the steps. Questions and constructs are refined at any point, leading to additional data collec-

tions using new or changed methods. Hypotheses and questions emerge as the study proceeds in the setting. Guba (1978) envisioned this recurring cycle as an undulating "wave", expanding as one went out to discover, gather data, open one's mind to new possibilities, and then narrowing, as one attempted to verify ideas, gather new data to corroborate, and seek more specific kinds of information. (See Figure 1, pg. 12a)

A Final Product

When one has sufficiently rested one's fingers from massive note-taking during field trips and one's eyes from examining the mountain of data, it is time to prepare some kind of final report. This is a crucial step. It is in large part in the "write-up" that the materials collected become ethnographically-oriented. The final product gives a description of what is going on and how it makes sense to those involved. The final product abstracts the social/cultural patterns (regularities) that serve as a basis for interpreting the descriptions.

Several patterns of social interaction among gifted children were abstracted in a study by Lutz and Lutz (1981). The researchers noticed, for example, greater voluntary social interaction among the gifted students during the time they were attending the pull-out program. While with their usual classmates, however, they tended to prefer children not in the gifted program, but who were nevertheless bright. Did the gifted children in this study like having a best friend who was a little less gifted than they because they enjoyed the lack of competition in such a relationship? Is this a general pattern among gifted students?

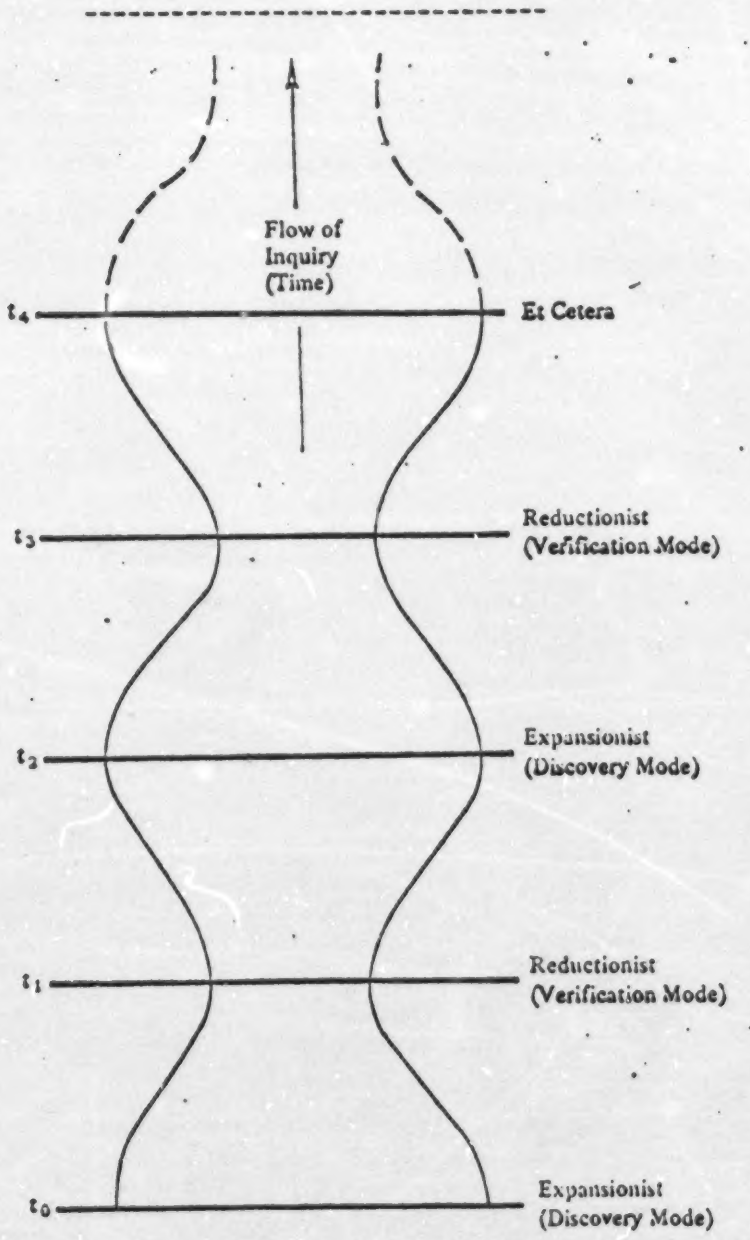

Figure 1: A "Wave" Conceptualization of Naturalistic Inquiry

(Guba, 1978)

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These hypotheses obviously need further testing. Finally, worthy ethnographic study produces a description so that others can see the generic in the particular.

In essence, the final product has some predictive power within and across cases regarding behavior. By considering the gifted education classroom as a social system with its own culture, we can expand our perception of gifted education.

Macro and micro approaches. Both the procedure and the product may be relatively macro or micro oriented. Macro means a broad, holistic understanding of overall, historical, cultural, or social contexts of a gifted education program. Micro may mean the topic is narrowed considerably. In addition, fewer behaviors may be examined.

For example, Janesick (1978) produced a macro analysis about what happened when a gifted teacher, who thought he had developed a climate of mutual respect and cooperation in his sixth-grade class, had to get a part-time substitute for six weeks; how the class fell apart; and how he rebuilt the group upon returning. From this macro study Janesick abstracted the teacher's theory of teaching and related it to other theories.

In contrast, a study which is micro-oriented might focus on evidence of the type of descriptors, style, world view, and audience orientation, gifted children use in their story-telling. Qualitative analysis may involve thorough, fine-grained examinations of transcript from audio or video tapes.

Focus. The focus of the final product may be on one or more of five aspects:

1. on the whole (culture as an integrative whole)
2. on the meaning from the participant's point of view (e.g., what did events mean to Lutz's gifted students and teachers?)
3. on behavior (what people did, the forms and functions of

behaviors across groups) (An example of the behavioral focus is my own studies of younger and older Swedish and American children engaging in creative problem-solving discussions (Lundsteen, 1983).

4. on the topic (on the central theme, such as gifted education or creative problem solving)
5. on hypotheses generation (hypotheses about events, usually within a general theoretical framework)
6. on theory

An example of the latter is Janesick's (1977) use of theory of symbolic interaction involving interpretive processes, decision making and construction of "self" through actions. Janesick's observed teacher decided that the first priority in teaching was establishing and maintaining a climate of cooperation and mutual respect. Often, of course, the final product shows more than one focus.

Conclusion

The processes used in ethnographic research and the products which emanate from it are not unnatural to us. Most of us are used to observing behavior in our gifted programs--looking at unique detail, noting shared characteristics in common with other instances, events or cases. We try to get an overall "feel" for what is going on. We ask, as would an ethnographer, "Of what is this case of a gifted child representative?" Such kinds of qualitative assessment are important methods that many of us take to rather naturally. Let

us bring them to a level of awareness and refine these methods already used in our lives.

The methods which are used in assessing from an ethnographic perspective have rigor yet flexibility. Within a broad cultural context, this ethnographic perspective"watches and asks," with ample time to find out. Admittedly a human instrument can be faulted as at once too detached and too involved, too subject to bias and to illness--and yet still be the most sensitive instrument we have come upon yet.

Advantages of qualitative methods are that they ought to help us better understand the central processes in which teachers and gifted children are engaged, both in the context of learning and in the personal context. These methods can give us depth of understanding, and fruitful hypotheses to test. They can uncover patterns of gifted children's responses, and avoid the error of oversimplying. They can provide triangulation, thorough field work, and disciplined notions from ethnography. Classes of events may be better understood through thorough examination of particular cases.

With respect to productive education of the gifted, qualitative research may be at present our least used way of assessing programs, at least as far as formal research methodology is concerned. Yet, it may be the most promising way of knowing--to echo the verse at the beginning--"where we are going, how we will get there, and how we will know we've arrived."

In conclusion, it may be helpful to suggest some sample research questions.

Some Questions for Ethnographic Research with the Gifted

1. What are the social roles gifted children play during their education?
2. What rules do they construct and follow in their social interaction?
3. How do participants in gifted programs hold one another accountable in relationship to tasks?
4. What are the varieties of processes and materials available for gifted students to choose from? How are these interacting with gifted abilities and education?
5. What are social interactional consequences of varying innovations in gifted education? "Innovation" might refer to: e.g., pull-out programs, mentors, projects.
6. How do teachers of gifted children orchestrate different participation levels? For example, consider competitive, cooperative, and individual activities.
7. In what contexts do gifted abilities flourish?
8. What other cases and contexts support, contradict, or expand present findings?

In general--"What's going on here?"

Some Final Recommendations

In conclusion, consider some recommendations.

1. Become conversant with a number of qualitative fieldwork tools and techniques, especially observation.

2. Read case studies and work using ethnographic perspectives; they will illustrate how to apply tools and techniques to actual situations.
3. When you are trying to understand what's going on in your setting, strive to probe for more rather than fewer factors about evaluation of gifted education. Some research and evaluation methods have had a tendency to oversimplify and constrict.
4. Develop a concern for a broad context. This attending to context may be the most important contribution of this kind of research, making research more natural, true-to-life, interesting, and valuable to teachers and their administrators.
5. Write some field notes yourself.
6. Set up a field note workshop and clinic with peers.
7. Share your "ethnographic perspective" education with "significant others" (parents, administrators, legislators.)
8. See if some of your older gifted children can develop and use an ethnographic perspective.

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